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## Germany

### Oilseeds and Products

### The German Peanut Market

### 2003

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**Report Highlights:**

Germany does not produce peanuts. German peanut imports varied from 80,000 MT to 138,000 MT over the past five years. Raw shelled peanuts make up an average of 75 percent of total peanut imports. The United States, Argentina, and China are the main suppliers of peanuts to the German market. German exports are marginal. Peanuts are exclusively used for human consumption (mainly snacks). Due to aflatoxin concerns there is no peanut crush in Germany.

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### Production

For climatic reasons, Germany does not produce peanuts, therefore consumption is met solely by imports.

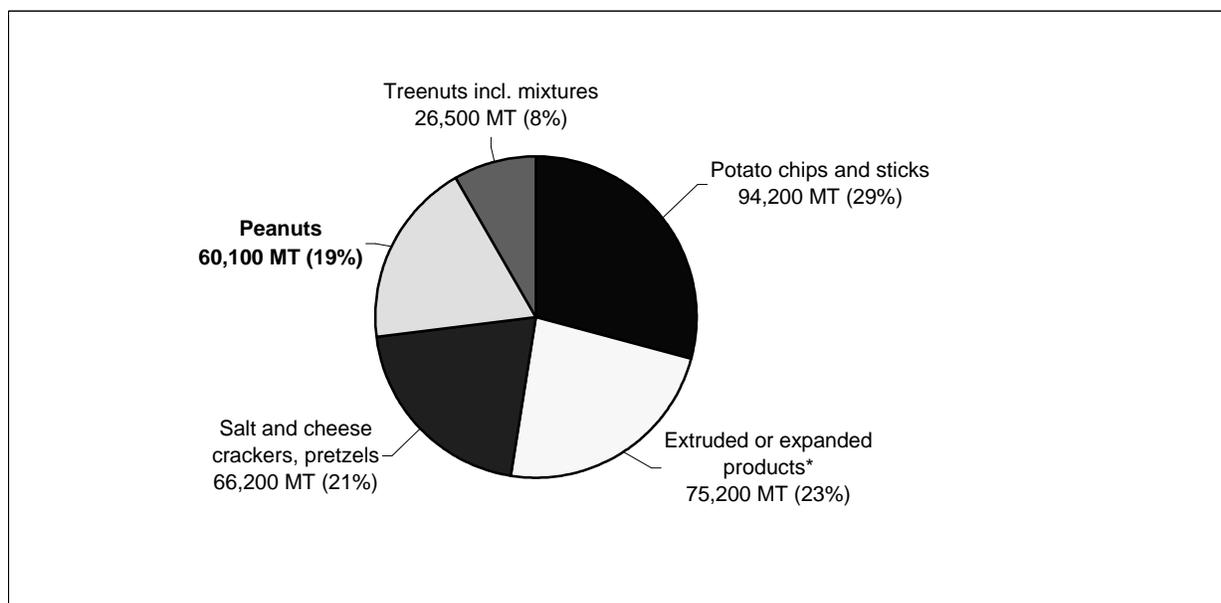
### Consumption

In Germany peanuts are exclusively used for human consumption. The crush of peanuts for oil, was stopped some 30 to 40 years ago, when it was discovered that high aflatoxin levels in peanut meal used as animal feed had detrimental effects on the animals. Instead, Germany imports all the peanut oil it needs. Over the past 15 years, annual peanut oil imports amounted to about 17,000 to 25,000 MT. Due to the lower tariff rates for crude vs. refined peanut oil, 70 to 90 percent of the peanut oil is imported as crude oil and further refined in Germany.

Peanut butter is not part of the traditional German breakfast and it is not manufactured here. Instead of peanut butter, Germans favor jams and chocolate/hazelnut spreads. However, peanut butter enjoys some popularity with the younger generation who is exposed to US lifestyle through U.S. shows on German TV. All major food retail chains with the exception of discount stores, stock at least one peanut butter brand. However, this is not necessarily a U.S. brand. According to German customs data, calculated peanut butter consumption (imports minus exports) has steadily increased from about 500 MT in 1998 to about 1100 MT in 2002. However, importers of peanut butter feel that the actual imports are at least double the amount stated by customs. The leading importer of U.S. peanut butter is *Dockhorn & Co.*

Peanuts traditionally are a very popular savory snack in Germany. In recent years they face increasing competition from tree nuts and product inventions/line extensions such as spicy potato- and tortilla-chips. Nevertheless, industry expects peanut consumption to remain stable. Total German production of savory snacks amounted to 322,200 MT in 2002 with a product value of about U.S. \$ 965,000 (803,900 Euro). The contribution of the different products is illustrated in chart 1.

**Chart 1: Contribution of different product categories to total production of savory snacks in Germany in 2002**



\* This category includes onion rings, tortilla chips, peanut corn curls and similar products.

Source: German Association of the Sweets Industry (*Bundesverband der Deutschen Süßwarenindustrie*)

## Trade

### Import

Peanuts are mostly sourced from the processing companies directly in the countries of origin, with no intermediate import traders/brokers involved.

The vast majority of peanuts is imported as shelled peanuts, followed by in-shell peanuts. Only comparatively small amounts of packaged peanuts are imported (see chart one), a result of higher tariffs on processed products. For details on import tariffs please see the "policy" section later in this report. Details on import volumes by CN/HS codes are shown in table 1. Information on import prices is listed in the annex.

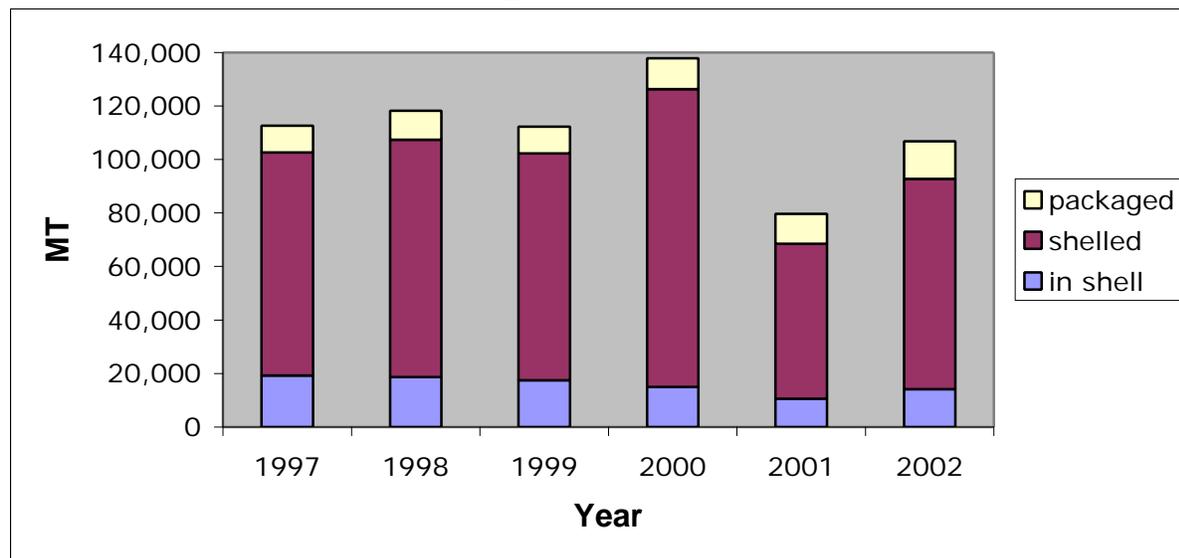
In 2002, the United States was the largest supplier of peanuts to Germany, with a market share of 37 percent. German peanut imports from the U.S. totaled 39,885 MT. Other big suppliers were Argentina, China and South Africa with market shares of 31 percent, 14 percent, and 8 percent, respectively.

92 percent of U.S. peanut shipments to Germany consisted of shelled peanuts. In this category, the U.S. held a market share of 47 percent. Argentina, South Africa and China were the main competitors with a 34 percent, 9 percent, and 5 percent market share, respectively.

77 percent of the in-shell peanuts were sourced from China. Main suppliers for roasted peanuts were Argentina (45 percent) and the Netherlands (27 percent).

U.S. peanuts enjoy a good reputation for quality. Some supermarkets take pride in stocking at least one peanut brand, that uses U.S. peanuts. However, generally Germany is a very price sensitive market and price is a very strong factor in the buying decision. This is reflected in current import trends. In the period of January through September of 2003, German imports from the U.S. decreased by 63 percent compared to the same period in 2002, due to the lower U.S. crop and the resulting higher prices. The average import price in U.S. \$ in Jan-Sept. '03 was 36 percent higher than in Jan-Sept. '02. For details on import prices please refer to table 6 in the annex to this report.

**Chart 2: German Peanut Imports by Product Type and Calendar Year  
(Volume MT- Product weight)**



Source: FAS based on data from the German Federal Office of Statistics, Wiesbaden

**Table 1: German Peanut Imports by Product Type (CN code) and Calendar Year  
(Volume MT- Product weight) \***

CN code**	Product	1997	1998	1999	2000	2001	2002	2002 Jan/Sep	2003 Jan/Sep
12021090	in shell peanuts	19,270	18,684	17,458	15,048	10,614	14,197	9,679	11,700
12022000	shelled peanuts	83,327	88,679	84,776	111,260	57,802	78,491	36,707	44,113
20081192	Roasted peanuts >1 kg	3,690	3,891	4,007	5,945	5,100	6,085	4,226	3,945
20081196	Roasted peanuts < =1 kg	4,932	5,301	5,120	5,172	5,793	7,757	5,516	4,766
20081194	Oth. pres./prep. peanuts >1 kg	58	62	96	42	65	63	31	35
20081198	Oth. pres./prep. peanuts <= 1 kg	1,298	1,626	803	448	246	177	114	125
	Total imports	112,575	118,243	112,260	137,915	79,620	106,770	56,273	64,684

\* to convert shelled peanuts into in-shell basis, multiply by 1.43

\*\* CN = Combined Nomenclature of the EU common customs tariff, the equivalent of the U.S. harmonized tariff schedule (HTS).

Data source: German Federal Office of Statistics, Wiesbaden

**Table 2: German Peanut Products Imports by Product Type (CN code) and Calendar Year (Volume MT- Product weight)**

CN code*	Product	1997	1998	1999	2000	2001	2002	2002 Jan/Sep	2003 Jan/Sep
15081090	Crude peanut oil	19,587	14,363	14,988	16,306	14,428	12,687	8,018	7,598
15089090	Refined peanut oil	2,780	3,188	3,140	2,689	3,321	4,115	2,646	3,053
20081110	Peanut butter	629	531	770	866	934	1,203	697	616

\* CN = Combined Nomenclature of the EU common customs tariff, the equivalent of the U.S. harmonized tariff schedule (HTS).

Data source: German Federal Office of Statistics, Wiesbaden

### Export

The majority of German peanut exports consists of packaged roasted peanuts that are shipped to other EU countries (France, the Netherlands, Austria, Italy) and Switzerland. A summary of export figures is given in table 3.

**Table 3: German Peanut Exports by Product Type (CN code) and Calendar Year (Volume MT- Product weight) \***

CN code**	Product	1997	1998	1999	2000	2001	2002	2002 Jan/Sep	2003 Jan/Sep
12021090	In shell peanuts	1,092	1,768	1,341	377	822	930	250	151
12022000	Shelled peanuts	4,072	4,926	5,041	3,420	2,154	1,647	721	902
20081192	Roasted peanuts >1 kg	1,301	1,236	1,010	1,681	790	1,214	813	102
20081196	Roasted peanuts < =1 kg	18,776	22,190	12,209	15,454	9,596	14,175	7,246	10,493
20081194	Other pres./prep. peanuts >1 kg	3	9	32	12	14	226	164	63
20081198	Other pres./prep. peanuts <= 1 kg	293	1,109	524	1,119	805	1,691	791	1,075
	Total exports	25,537	31,238	20,157	22,063	14,181	19,883	9,985	12,786

\* to convert shelled peanuts into in-shell basis, multiply by 1.43

\*\* CN = Combined Nomenclature of the EU common customs tariff, the equivalent of the U.S. harmonized tariff schedule (HTS).

Data source: German Federal Office of Statistics, Wiesbaden

## Policy

### Aflatoxin

Aflatoxin is a group of fungal toxins that are produced by *Aspergillus flavus* and *Aspergillus parasiticus*, which grow easily on peanuts when they are inappropriately stored in warm, humid conditions. Aflatoxin is a powerful liver carcinogen and therefore receives a lot of attention to ensure food safety. Maximum aflatoxin levels for all of the EU are laid down in Commission Regulation 466/2001 and are also valid in Germany.

**Table 4: EU Maximum Level for Aflatoxin in Peanuts**

Maximum Levels for Aflatoxins			
	B1	B1, B2, G1 and G2 combined	Sampling methods
Groundnuts, nuts and dried fruit and processed products thereof, intended for direct human consumption or as an ingredient in foodstuffs	2 microgram/kg	4 microgram/kg	Directive 98/53/EC
Groundnuts to be subjected to sorting, or other physical treatment, before human consumption or use as an ingredient in foodstuffs	8 microgram/kg	15 microgram/kg	Directive 98/53/EC
Nuts to be subjected to sorting, or other physical treatment, before human consumption or use as an ingredient in foodstuffs	5 microgram/kg	10 microgram/kg	Directive 98/53/EC

Source: EU Official Journal L 077 , published March 16, 2001, pages 1 – 13, for internet link please refer to the annex.

## Import tariffs

Current EU-import tariffs are shown in the following table 5.

**Table 5: EU Import Tariffs for Peanuts and Peanut Products for 2003 and 2004**

EU Import Tariffs		
1202 10 90	Peanuts in shell excl. roasted	free
1202 20 00	Shelled peanuts, whether or not broken	free
1508 10 10	Crude peanut oil for industrial use	free
1508 10 90	Other crude peanut oil	6.4
1508 90 10	Peanut oil for industrial use excl. crude	5.1
1508 90 90	Peanut oil for human consumption excl. crude	9.6
2008 11 10	Peanut butter	12.8
2008 11 92	Roasted peanuts > 1 kg	11.2
2008 11 94	Roasted peanuts =< 1 kg	11.2
2008 11 96	Other pres/prep. peanuts, > 1 kg	12.0
2008 11 98	Other pres/prep. peanuts, =<1 kg	12.8

Source:

For 2003: Commission Regulation 1832/2002, EU Official Journal L 290, Oct. 28, 2002.

For 2004: Commission Regulation 1789/2003, EU Official Journal L 281, Oct. 30, 2003 (for an internet link please refer to the annex of this report)

## Annex

### Processors and packers of peanuts

One of the biggest companies that processes and packages peanuts in Germany is *Felix The Nut Company*, which has production facilities in Germany, the Netherlands, France and Poland. Their main peanut brands in Germany are "ültje" and "Pittjes".

Felix The Nut Company  
 P.O.Box 1209  
 58207 Schwerte  
 Phone: +49 (0) 2304 472 0  
 Fax: +49 (0) 2304 472 10  
[www.thenutcompany.com](http://www.thenutcompany.com)

For information on other processors please contact post.

A big producer for extruded peanut products such as peanut corn curls is:

Intersnack  
 Aachener Str. 1042  
 50858 Köln  
 Phone: +49 -(0) 221 - 4894 -0  
 Fax: +49- (0) 221 - 4894 -200  
[www.intersnack.de](http://www.intersnack.de)

**Importers of U.S. peanut butter**

Dockhorn & Co  
Import-Export GmbH  
Alsterdorfer Str. 247  
22297 Hamburg  
Phone: +49-(0)40 - 511 50 65  
Fax: +49-(0)40 511 50 68  
e-Mail: [info@dockhorn.com](mailto:info@dockhorn.com)  
[www.dockhorn.com](http://www.dockhorn.com)

Dunekacke & Wilms Nachf. GmbH & Co. KG  
Hinschenfelder Stieg 12c  
22041 Hamburg  
Phone: +49-(0)40/696 515-0  
Fax: +49-(0)40/693 73 62  
e-mail: [d-w@dunekacke.de](mailto:d-w@dunekacke.de)  
[www.dunekacke.com](http://www.dunekacke.com)

Rila Feinkost Importe GmbH & Co KG  
Hinterm Teich 5  
32351 Stemwede-Levern  
Phone: +49-(0)57 45- 94 50  
Fax: +49-(0)57 45- 94 51 39

**Useful Internet Links**

German Association of the Sweets Industry (*Bundesverband der Deutschen Süßwarenindustrie*)  
[www.bdsi.de](http://www.bdsi.de)

Waren-Verein der Hamburger Börse  
[www.warenverein.de](http://www.warenverein.de)

Commission regulation 466/2001 setting maximum levels for certain contaminants in foodstuffs:  
[http://europa.eu.int/eur-lex/pri/en/oj/dat/2001/l\\_077/l\\_07720010316en00010013.pdf](http://europa.eu.int/eur-lex/pri/en/oj/dat/2001/l_077/l_07720010316en00010013.pdf)

EU tariff information for 2004:  
Commission Regulation (EC) No 1789/2003 of 11 September 2003 amending Annex I to Council Regulation (EEC) No 2658/87 on the tariff and statistical nomenclature and on the Common Customs Tariff  
[http://europa.eu.int/eur-lex/pri/en/oj/dat/2003/l\\_281/l\\_28120031030en00010893.pdf](http://europa.eu.int/eur-lex/pri/en/oj/dat/2003/l_281/l_28120031030en00010893.pdf)

## Import Prices

**Table 6: Average monthly import prices by product category and origin  
(January 2002 –September 2003, in U.S. \$/ MT, CIF Germany)**

	CN code* 1202 10 90 Peanuts in shell excl. roasted				
	World	U.S.	EU-15	China	Argentina
2002 January	642.85	778.43	552.08	578.86	-
2002 February	897.55	1014.77	-	746.98	-
2002 March	732.75	-	1547.06	571.13	-
2002 April	1239.53	785.95	-	568.45	282.98
2002 May	812.11	1150.00	542.25	640.97	-
2002 June	846.64	1002.76	664.57	870.30	-
2002 July	955.58	661.67	-	759.52	-
2002 August	654.59	664.16	873.21	631.64	-
2002 September	576.22	628.63	-	573.62	-
2002 October	766.04	681.48	-	586.53	-
2002 November	1016.25	-	603.21	564.39	-
2002 December	830.26	838.91	733.78	758.63	-
2003 January	814.05	382.40	720.71	773.32	552.40
2003 February	822.30	891.72	-	770.29	-
2003 March	779.73	720.00	981.82	621.12	-
2003 April	808.16	-	3616.67	687.44	-
2003 May	737.67	-	811.00	679.22	-
2003 June	693.71	942.42	-	679.73	771.07
2003 July	708.26	-	824.15	653.90	-
2003 August	696.85	657.59	-	673.26	-
2003 September	678.78	1600.00	-	678.59	-

	CN code* 1202 20 00 shelled peanuts, whether or not broken				
	World	U.S.	EU-15	China	Argentina
2002 January	576.52	567.00	1009.15	641.82	331.73
2002 February	756.49	967.57	-	713.11	649.25
2002 March	645.58	334.63	-	606.49	649.42
2002 April	872.43	978.37	-	613.86	314.62
2002 May	640.93	930.84	239.99	502.14	333.23
2002 June	925.20	954.02	-	804.35	948.24
2002 July	654.48	863.89	-	505.46	371.01
2002 August	697.01	905.40	-	-	343.53
2002 September	822.35	823.62	-	777.81	850.48
2002 October	463.60	393.18	-	618.08	456.62
2002 November	897.23	974.51	3333.33	783.38	815.76
2002 December	896.04	1095.32	910.03	705.82	875.94
2003 January	843.89	816.57	-	875.39	890.68
2003 February	741.42	1036.92	-	793.83	558.54
2003 March	938.52	939.66	-	847.37	955.13
2003 April	827.75	953.36	-	821.17	639.56
2003 May	1045.97	1275.93	1072.38	909.83	1050.18
2003 June	1030.40	1372.14	-	873.73	1007.36
2003 July	1012.32	1400.75	-	772.33	810.45
2003 August	941.61	1053.96	-	996.58	940.80
2003 September	951.96	1009.76	-	755.71	971.59

CN code* 2008 11 92 roasted peanuts > 1 kg					
	World	U.S.	EU-15	China	Argentina
2002 January	1400.57	1394.74	1401.19	913.79	-
2002 February	1237.11	918.63	1462.99	-	1359.68
2002 March	1283.89	1126.56	1550.09	3500.00	957.04
2002 April	1277.27	1155.34	1409.44	-	1020.13
2002 May	1658.21	-	1695.75	1528.57	-
2002 June	1348.13	1370.14	1505.12	-	1142.11
2002 July	1583.07	1303.81	1835.11	1353.41	1124.33
2002 August	1334.17	1255.68	1482.94	1279.44	1081.97
2002 September	1390.60	1232.82	1534.16	1348.75	1158.36
2002 October	1285.88	1480.82	1382.64	1272.22	1195.13
2002 November	1369.18	1193.46	1470.71	-	1155.77
2002 December	1420.48	1234.80	1570.40	1474.48	-
2003 January	1346.45	1318.21	1519.94	1514.29	-
2003 February	1373.59	1312.18	1529.91	893.89	-
2003 March	1410.90	1615.46	1532.75	3600.00	1235.67
2003 April	1642.70	1620.33	1801.81	790.97	1401.17
2003 May	1722.22	1546.67	1868.25	-	1544.17
2003 June	1609.31	-	1856.65	809.95	1682.21
2003 July	1561.12	-	1906.43	789.58	1431.38
2003 August	1506.51	2931.58	1657.58	1192.58	1410.65
2003 September	1453.19	-	1738.16	817.03	1319.92

CN code* 2008 11 96 roasted peanuts =< 1 kg					
	World	U.S.	EU-15	China	Argentina
2002 January	1956.79	2037.66	2789.47	-	1860.40
2002 February	1709.97	1797.28	2264.38	8700.00	1666.11
2002 March	1689.24	2581.05	1847.37	-	1662.63
2002 April	1696.74	2587.64	2082.35	-	1641.77
2002 May	2159.27	2097.86	3530.77	-	-
2002 June	1877.09	1855.13	2252.59	1600.00	1797.83
2002 July	1987.97	2173.33	2660.00	9900.00	1880.89
2002 August	1881.45	1963.99	2328.57	-	1837.61
2002 September	2042.15	1974.11	2564.97	-	1860.31
2002 October	1878.19	1759.04	1669.50	-	1863.43
2002 November	2014.11	2201.10	2494.89	1128.17	1888.35
2002 December	1981.89	1915.69	2289.24	1233.33	1917.77
2003 January	1925.15	1860.56	2269.32	1514.29	1917.06
2003 February	1890.20	1820.29	2440.63	-	1881.05
2003 March	2080.36	2551.87	2593.73	-	1868.60
2003 April	1892.63	1923.44	2225.00	-	1867.68
2003 May	2171.94	2324.05	2803.19	3314.29	2013.09
2003 June	2095.66	2274.88	2588.22	-	2022.18
2003 July	1994.00	2235.14	1295.28	-	1974.15
2003 August	2075.24	2035.77	2802.97	-	1937.90
2003 September	1994.30	2005.90	2286.96	-	1958.46

CN code* 2008 11 94 unroasted peanuts > 1kg					
	World	U.S.	EU-15	China	Argentina
2002 January	4415.00	-	4415.00	-	-
2002 February	4350.00	5800.00	-	-	-
2002 March	2190.63	-	2357.69	-	-
2002 April	2658.33	-	2780.39	-	-
2002 May	2158.82	-	-	-	-
2002 June	3516.00	-	3675.00	-	-
2002 July	2380.00	-	2380.00	-	-
2002 August	3261.11	-	-	-	-
2002 September	6533.33	-	6533.33	-	-
2002 October	3863.64	-	4203.57	-	-
2002 November	1831.71	-	-	-	-
2002 December	2545.45	-	4364.29	3400.00	-
2003 January	969.29	-	-	643.64	-
2003 February	2700.00	5400.00	-	-	-
2003 March	2160.00	-	-	3240.00	-
2003 April	1661.54	-	-	1350.00	-
2003 May	2676.92	-	-	-	-
2003 June	1950.00	-	-	-	-
2003 July	2843.75	-	2273.33	-	-
2003 August	2133.33	-	-	-	-
2003 September					

CN code* 2008 11 98 other pres./prep. peanuts =< 1 kg					
	World	U.S.	EU-15	China	Argentina
2002 January	1204.55	-	-	-	-
2002 February	1589.42	-	1677.11	-	-
2002 March	2056.79	-	2336.67	-	-
2002 April	1548.95	-	1914.86	741.67	-
2002 May	2038.38	-	1976.72	2158.82	-
2002 June	2482.35	-	2547.33	-	-
2002 July	2350.52	-	2527.88	-	-
2002 August	1866.67	-	-	-	-
2002 September	3360.00	-	3920.00	-	-
2002 October	1877.03	-	1823.01	1442.65	-
2002 November	2236.87	-	2305.04	1111.11	-
2002 December	1663.40	-	2648.00	5100.00	-
2003 January	1514.29	-	-	-	-
2003 February	1873.04	-	2122.73	-	-
2003 March	2419.90	-	3272.48	-	-
2003 April	2759.65	-	2829.89	-	-
2003 May	2156.86	-	2071.54	2423.26	-
2003 June	2785.57	-	2915.85	-	-
2003 July	1723.23	-	1844.59	-	-
2003 August	2531.82	-	2531.82	-	-
2003 September	2176.36	-	2121.26	-	-

\* CN = Combined Nomenclature of the EU common customs tariff, the equivalent of the U.S. harmonized tariff schedule (HTS).

Source: German Customs Data